

Tuesday – April 14, 2026
JAPAN MARKETING UPDATE



February 1-28, 2026

Total: 69,535 (+14.1%)

% Market Mix	Origin	2025	2026	% vs LY
36.0%	Japan	20,982	25,039	19.3%
45.9%	Korea	29,891	31,944	6.9%
8.2%	US/Hawaii	6,004	5,707	-4.9%
1.3%	Philippines	988	927	-6.2%
2.4%	Taiwan	90	1,672	1757.8%
1.6%	China	415	1,079	160.0%
0.1%	Hong Kong	42	73	73.8%

Source: Guam Customs Declaration Forms. Processed by the Guam Visitors Bureau.

March 1-31, 2026

Total: 66,449 (+8.5%)

% Market Mix	Origin	2025	2026	% vs LY
49.7%	Japan	27,467	33,048	20.3%
31.2%	Korea	22,224	20,764	-6.6%
10.5%	US/Hawaii	6,905	6,976	1.0%
1.6%	Philippines	1,229	1,085	-11.7%
0.9%	Taiwan	97	582	500.0%
0.4%	China	227	275	21.1%
0.1%	Hong Kong	67	68	1.5%

Source: Guam Customs Declaration Forms. Processed by the Guam Visitors Bureau.

Note: March 2026 Daily Arrivals reflect Civilian Air arrivals only

CALENDAR YEAR TO DATE 2026



October 2025 – March 1-31, 2026

Total: 205,524 (+8.4%)

% Market Mix	Origin	2025	2026	% vs LY
39.7%	Japan	68,498	81,505	19.0%
42.0%	Korea	86,114	86,373	0.3%
9.4%	US/Hawaii	19,997	19,259	-3.7%
1.5%	Philippines	2,990	3,184	6.5%
1.4%	Taiwan	1,898	2,898	52.7%
0.8%	China	1,367	1,653	20.9%
0.1%	Hong Kong	150	182	21.3%

Source: Guam Customs Declaration Forms. Processed by the Guam Visitors Bureau.

Note: March 2026 Daily Arrivals reflect Civilian Air arrivals only

FISCAL YEAR TO DATE 2026



October 2025 – March 1-31, 2026

Total: 434,496 (+19.1%)

% Market Mix	Origin	2025	2026	% vs LY
35.0%	Japan	124,344	151,982	22.2%
47.9%	Korea	170,913	208,087	21.8%
8.2%	US/Hawaii	38,384	35,826	-6.7%
1.8%	Philippines	6,947	7,898	13.7%
1.1%	Taiwan	3,102	4,760	53.4%
0.6%	China	2,349	2,685	14.3%
0.1%	Hong Kong	314	380	21.0%

Source: Guam Customs Declaration Forms. Processed by the Guam Visitors Bureau.

Note: March 2026 Daily Arrivals reflect Civilian Air arrivals only

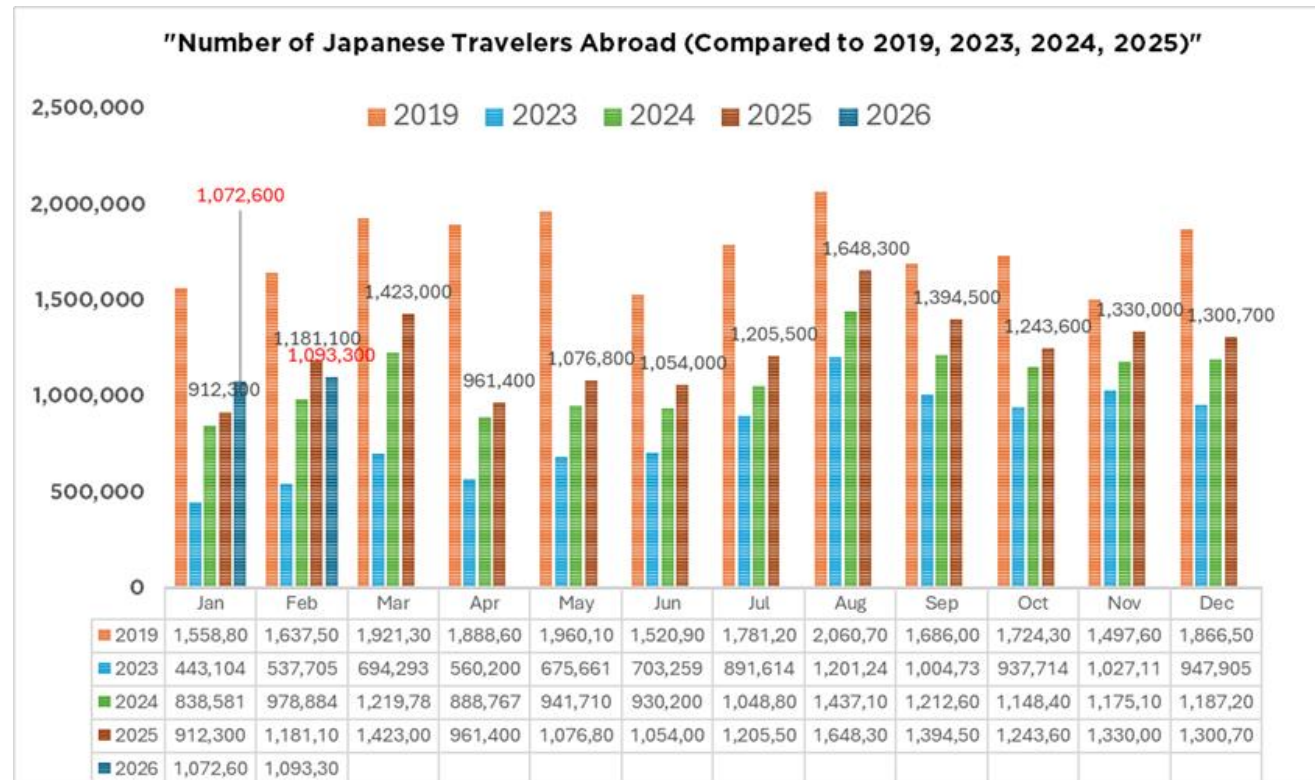


JAPAN MARKET REPORT



Japanese Overseas Travel Shows Temporary Decline

- According to the Japan National Tourism Organization (JNTO), the number of Japanese outbound travelers in February 2026 was about 1.09 million, down 7.4% compared to the same month last year.
- Compared to February 2019, the number was still 28.8% lower, showing that the recovery in overseas travel demand is ongoing.
- Although outbound travel had been increasing in recent months, February saw a decline again, indicating a temporary slowdown in recovery.



JTB Report: Golden Week Trends Show Shift Toward Short-Haul and Value-Oriented Travel

➤ Travel Overview (GW 2026)

- Demand shows **modest recovery** (+1–2% YoY)
- **Price sensitivity** remains high

➤ Outbound Travel

- Recovery continues, but impacted by **weak yen and rising costs**
- Demand concentrated in **nearby destinations (Asia)**

➤ Consumer Behavior

- Shift toward **shorter, closer, and more affordable trips**
- Increased focus on **safety and value**

➤ Implications for Guam

- Strong alignment with **short-haul demand trends**
- Importance of communicating **value for money**



Impact of the Middle East Situation Driving Japan's Outbound Demand Toward Short-Haul Destinations

➤ Market Background

- Airspace restrictions and closures over the Middle East following the Iran situation
- Flight cancellations and rerouting affecting Europe and long-haul routes
- Increasing uncertainty around long-haul travel

➤ Travel Trade Response

- Middle East: Tours suspended across major travel agencies
- Europe: Continued operations with adjusted flight routes

➤ Demand Shift

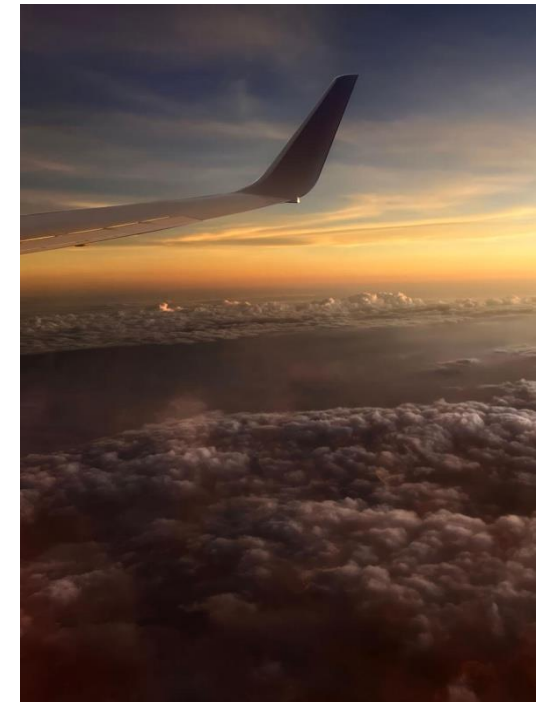
- Growing preference for destinations **not requiring transit through the Middle East**
- Strong shift toward **short-haul travel**
- Increased focus on **safety and accessibility**

➤ Implications for Guam

- Competitive advantage as a **direct, short-haul destination**
- Positioned to capture demand shifting away from long-haul markets

➤ Fuel Surcharge Outlook

- Fuel surcharge expected to **approximately double** for tickets issued from **June 1 onward** (including Guam routes)
- Anticipated **last-minute booking surge** through end of May



GUAM PAY Extension in Response to Travel Trade Demand and Recent Market Shifts

➤ Background

- Strong requests from travel agencies to **continue the program**
- Middle East situation creating **instability in long-haul travel**
- Demand shifting toward **short-haul, safer destinations**

➤ Objective

- Extension decided to **capture this shifting demand and maximize sales opportunities**
- Strengthen bookings ahead of the **fuel surcharge increase**

➤ Key Takeaways

- A **timely response** to changing market conditions
- Functions as a **joint demand-driving tool with travel trade partners**



Japan Market – Guam Campaigns (Mar – mid Apr 2026)

Company	Campaign	Period	Key Features (Condensed)
HIS	Memory-Making with Shimajiro! Waku Waku Guam	Apr 1, 2026 – Mar 15, 2027	HIS is driving family travel demand to Guam through a Shimajiro-themed campaign with exclusive tour benefits and kid-friendly experiences.
	Direct Charter Flights to Guam from Fukuoka / Guam 4 Days	Mar 19 - 25	HIS is boosting family travel demand to Guam from Fukuoka through direct charter flights and a half-price child fare offer, making the destination more accessible and appealing to travelers with children.
	Guam Time Sale	Due Mar 23	A value-driven sale offering round-trip JAL flights from Narita and a 4-day Guam stay from ¥59,800, helping position Guam as an accessible and affordable short-haul getaway.
	HIS Summer Ahead! Summer Travel Campaign		HIS is stimulating Guam demand through an early-booking summer campaign, using discount offers to encourage advance reservations and make overseas travel more attractive.
JTB	KOMI-KOMI Course Guam 4 Days	Due April 30	JTB is driving Guam demand through a value-added 4-day package that combines flexible travel options with bundled local experiences and limited-time booking discounts
	JTB Time Sale	due Apr 22	JTB is driving Guam demand through a limited-time sale, using discounted package offers and time-sensitive booking incentives to encourage near-term reservations.
Trip.com	Trip.com Super Flight Day	Mar 23 – 25	Trip.com is stimulating Guam demand through a limited-time flight sale and coupon campaign, using low fares and hotel discounts to make travel more affordable and appealing.
JAL	JALun Lun New Life & Spring Travel Support Campaign	Mar 17 - 31	JAL is stimulating Guam demand through a spring travel time sale with coupon discounts of up to ¥40,000 per person, helping make Guam packages more attractive and affordable.
Centrair	Eat Guam Cuisine and Win a Trip to Guam! GOGO! GUAM Campaign	Mar 12 – Apr 30	Centrair is boosting Guam’s visibility through a Guam food fair and prize campaign, using local dining experiences and travel rewards to drive awareness and future travel interest.

From March to mid-April, Guam promotions were led mainly by short-term, price-driven campaigns such as time sales, limited-time coupons, and early-booking offers. Family-focused and regional initiatives, including charter flights and child fare deals, also helped broaden appeal beyond simple discounting.



直行チャーター便で約4時間

春休み

子ども半額

グアム4日間

福岡空港発着



JAL LuvLuv

新生活&春旅

海外航空券 応援キャンペーン

タイムセール開催!

ホノルル行き往復**87,000円**~!

販売期間: 3月19日(木) 00:00~3月29日(日) 23:59



HIS 夏先ドリ

早めの子約でう〜んとお得に!

夏先ドリ

キャンペーン



夏の旅行が最大**6万円引!**

海外 最大**6万円引!**

国内 最大**1万円引!**




SEAT CAPACITY SUMMARY



	APR	MAY	JUN	TTL
UNITED 	21,082	24,568	23,572	69,222
 JAPAN AIRLINES	5,373	6,169	5,970	17,512
t'way	1,134	1,323	0	2,457
TTL	27,589	32,060	29,542	89,191

NUMBER OF FLIGHT SUMMARY



	APR	MAY	JUN	TTL
	127	148	142	417
 JAPAN AIRLINES	27	31	30	88
	6	7	0	13
TTL	160	186	172	518

FLIGHT OPERATION - April



April Total Outbound Seat Capacity: 27,967

Interviews with various companies

AIRLINES	CURRENT STATUS	FLIGHT	DEPARTURE	TIME	FREQUENCY	SEAT CAPACITY
	Available	UA 827	NRT	11:00 / 15:45	Daily	4,482
	Available	UA 197	NRT	17:00 / 21:40	Daily	4,482
	Available	UA 865	NRT	17:55 / 22:40	Mon, Fri	1,162
	Available	UA 848	HND	23:35 / 4:25+1	Daily	4,482
	Available	UA 136	NGO	11:30 / 16:00	Mon,, Thu, Fri	1,992
	Available	UA 150	KIX	11:05 / 15:40	Daily	4,482
TTL						21,082

AIRLINES	CURRENT STATUS	FLIGHT	DEPARTURE	TIME	FREQUENCY	SEAT CAPACITY
	Available	JL941	NRT	9:30 / 14:15	Daily	5,373
	Available (Suspended: Apr 6-30)	TW 509	KIX	10:40 / 15:30	Daily	1,323
	Charter	TW	NRT	10:40 / 15:25	1 flight	189
TTL						6,885

FLIGHT OPERATION - May



May Total Outbound Seat Capacity: 32,060

Interviews with various companies

AIRLINES	CURRENT STATUS	FLIGHT	DEPARTURE	TIME	FREQUENCY	SEAT CAPACITY
	A vailab le	UA 827	NRT	11:00 / 15:45	Daily	5,146
	A vailab le	UA 197	NRT	17:00 / 21:40	Daily	5,146
	A vailab le	UA 865	NRT	17:55 / 22:40	Mon, Fri	1,328
	A vailab le	UA 848	HND	23:35 / 4:25+1	Daily	5,146
	A vailab le	UA 136	NGO	11:30 / 16:00	Mon,, Thu, Fri (+2fl)	2,656
	A vailab le	UA 150	KK	11:05 / 15:40	Daily	5,146
TTL						24,568

AIRLINES	CURRENT STATUS	FLIGHT	DEPARTURE	TIME	FREQUENCY	SEAT CAPACITY
	A vailab le	JL941	NRT	9:30 / 14:15	Daily	6,169
	A vailab le (Suspended : 5/08 ~ 7/16)	TW 509	KK	10:40 / 15:30	Daily	1,323
TTL						7,492

FLIGHT OPERATION - June



June Total Outbound Seat Capacity: 29,542

Interviews with various companies

AIRLINES	CURRENT STATUS	FLIGHT	DEPARTURE	TIME	FREQUENCY	SEAT CAPACITY
	Available	UA 827	NRT	11:00 / 15:45	Daily	4,980
	Available	UA 197	NRT	17:00 / 21:40	Daily	4,980
	Available	UA 865	NRT	17:55 / 22:40	Mon, Fri	1,494
	Available	UA 848	HND	23:35 / 4:25+1	Daily	4,980
	Available	UA 136	NGO	11:30 / 16:00	Mon, Thu, Fri	2,158
	Available	UA 150	KK	11:05 / 15:40	Daily	4,980
TTL						23,572

AIRLINES	CURRENT STATUS	FLIGHT	DEPARTURE	TIME	FREQUENCY	SEAT CAPACITY
	Available	JL941	NRT	9:30 / 14:15	Daily	5,970
	Suspended : 5/08 ~ 7/16	TW 509	KK	10:40 / 15:30	Daily	0
TTL						5,970

DESTINATION COMPARISON BY CAMPAIGN



Finland



Finland Tourism Board: Experiential Campaign Leveraging “World’s Happiest Country” Recognition

- Launched a campaign tied to Finland’s ninth consecutive ranking as the world’s happiest country.
- Drove engagement through a dedicated entry site offering a 7-day hosted stay in the Finnish Lakeland region for six pairs.
- Promoted Finland’s wellness appeal by linking nature, sauna culture, and digital detox to travel motivation.

Thailand



Thailand Tourism Authority: New Campaign to Boost Southern Thailand Travel Among International Visitors

- Launched a month-long campaign to stimulate inbound travel to Southern Thailand through Hat Yai.
- Used passport-based activation with gift distribution, prize draws, and QR-linked privileges to drive visitor engagement.
- Expanded local spending opportunities through participation from more than 100 restaurants, hotels, and retail outlets.

Australia



Western Australia Tourism Board: New Campaign Video Launch and Ambassador Program to Showcase Destination Appeal

- Released a new campaign video as the next phase of its global “WALKING ON A DREAM” campaign.
- Showcased five distinct areas of Western Australia to position the destination as a world-class dream holiday.
- Launched a six-ambassador content program to amplify experiential themes and support travel trade product development.



OLD BUSINESS

SNS HIGHLIGHTS



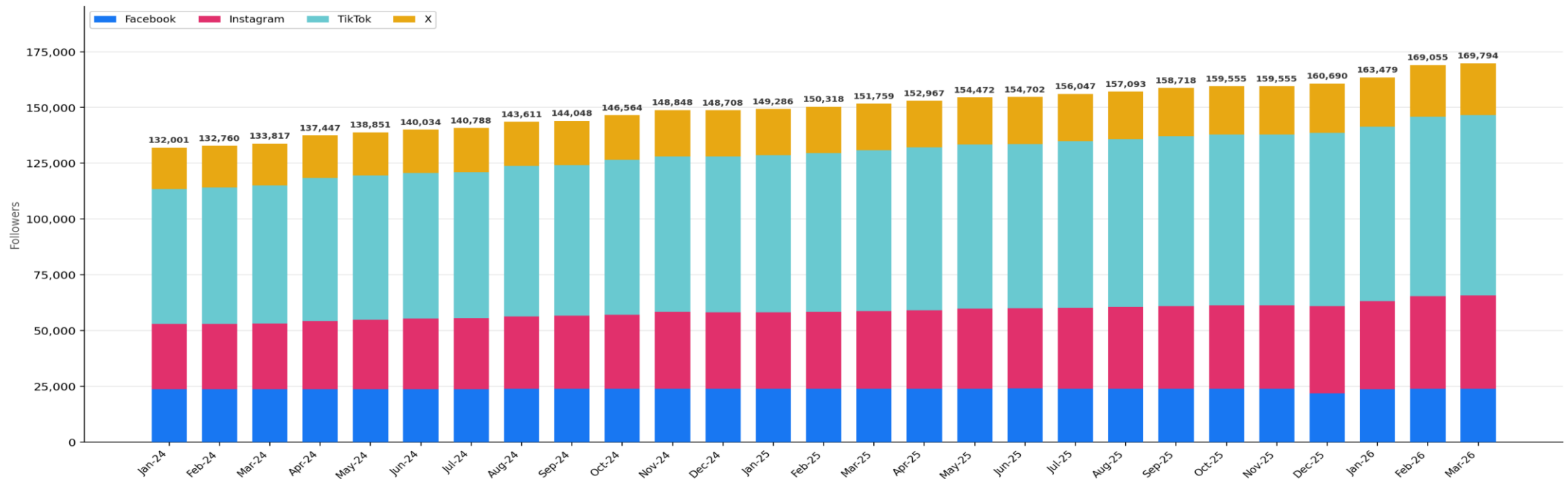
- Total SNS followers grew steadily by **+6,315 (+3.72%)**, led by Instagram as the primary growth **engine (+417 / +1.75%)**.
- In contrast, Facebook and X showed limited momentum, highlighting a clear performance gap across platforms and an increasing reliance on Instagram for audience expansion.

TOTAL SNS FOLLOWERS (Mar-26)

169,794

+6,315 (+3.72%) vs. Feb-26

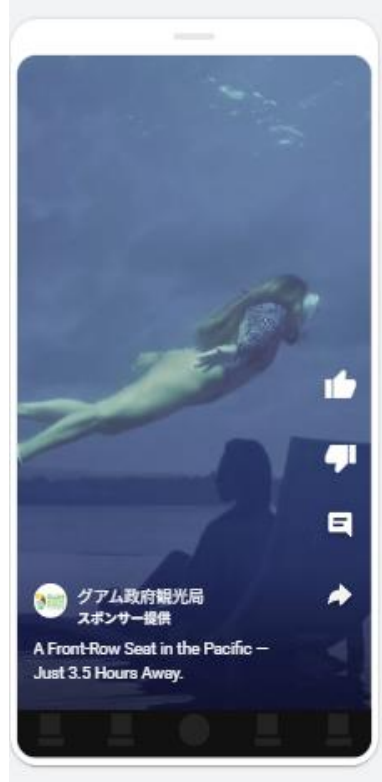
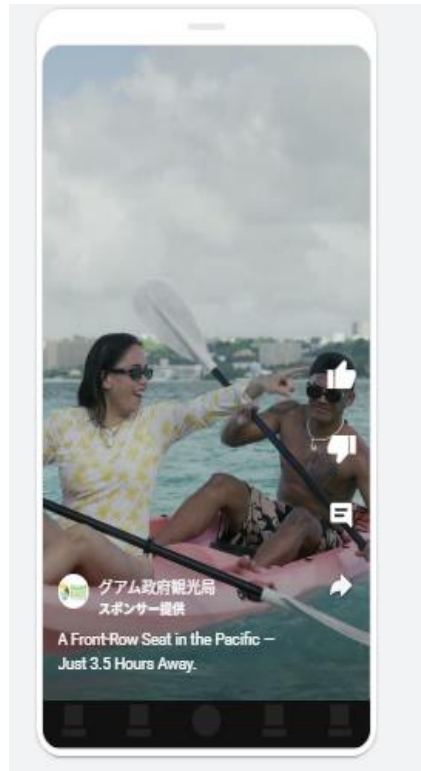
SNS FOLLOWER INCREMENTAL TREND FY24 - FY26



ALWAYS ON ADS/ CV ADS

In March, three campaigns were executed—Brand Campaign, Ko'ko' Road Race, and Hafa Adai Campaign—achieving a total reach of approximately 41.5 million.

Brand campaign
25M Reach



Koko Road Race
6.5M Reach



Hafa Adai campaign
10M Reach



Views continue to grow steadily, demonstrating sustained audience engagement and long-tail content value.



#502 【グアム!!】 ジェット噴射經理
の日
144万回視聴・1か月前



#501 【グアム!!】 旅に行くなら山田
x1が必要と思った日
198万回視聴・1か月前



#500 【大型企画発動!!】 こんな雪の
日に投稿するの?の日
224万回視聴・1か月前



#505 【グアム!!】 祀がやっちゃった
日
290万回視聴・1か月前



#504 【グアム最後の夜】 みんなをガ
ブガブしちゃう日
152万回視聴・1か月前



#503 【グアム!!】 買い出しでプーブ
一言った日
190万回視聴・1か月前

- Total Views: 13.86M (and still growing)
 - Guam content has proven a repeatable path from views → buzz → on-island spending.
- Key Proof
 - Hats featured in Yoni's Guam episode sold out at Kmart / Don Quijote
 - Customers visited stores after watching the video
 - Content directly drove retail sales in Guam
- Strategic Value
 - This proves Guam content converts awareness into real visitor spending, creating a scalable model for future drama, influencer, and ambassador campaigns.



【シンジラレナイハナシ26】日本を飛び出しグアムでの開催。ここでしか聞けない衝撃の都市伝説【...

101万回視聴・8日前



【シンジラレナイハナシ27】日本を飛び出しグアムでの開催。常識を覆す驚愕の都市伝説【ゲスト：...

55万回視聴・1日前

- Entertainment-Driven Travel Proof
 - Koyakky Studio’s Guam series has already surpassed **2M views**, with multiple episodes continuing to deliver **1.5M–2.9M high-performing viewership**.
 - The Guam experience itself is functioning as entertainment-driven travel motivation
- Strategic Value
 - This proves Guam is already a highly content-compatible destination where:
 - “Watch it → want to go”
 - “Go there → want to recreate the same experience”
 - This strong affinity with video content creates a scalable model for future creator, drama, and ambassador campaigns.

V-TUBER PROGRAM

Project Overview:

V-tubers Manha and Niyok will serve as iconic representatives, highlighting Guam's unique attractions and creating an engaged fanbase on social media.

Update:

- Chamoru cuisine was prominently featured in the latest video, and GVB's official Chamoru food chef, Daisuke, was invited to the studio to conduct a live cooking demonstration.
- The episode successfully showcased the delicious taste, visual appeal, and cultural value of Chamoru dishes, making Guam's unique food culture more accessible and appealing to viewers.

Numerical Status (Mar 13, 2025 – March 14, 2026)

Channel Impressions	57.6K
Monthly Audience	763K
# of followers increased	+28



FOOD TRUCK PROGRAM

We have launched Chamoru food promotions using food trucks in both Tokyo and Osaka. Starting this year, Chamoru spareribs have been added as a new menu item to enhance the program.

February Result

OSAKA	HANAHAKU TSURUMI PARK	TSURUMI-KU	Denanche Burger	71
			chamoro bowl	36
	MAISHIMA	KONOHANA-KU	Denanche Burger	14
			chamoro bowl	11
TOKYO	UENO SAKURA MATSURI	TAITOU-KU	TINKTAK RICE	342
			Spare ribs	158
	TOKYO KOTSUKAIKAN	CHIYODA-KU	Denanche Burger	16
			chamoro bowl	12

Total units sold

660



March Event Schedule:

Tokyo

14th–22nd @ Ueno Park Cherry Blossom Festival

26th–27th @ Tokyo Kotsu Kaikan

Osaka

7th–8th @ Hanahaku Tsurumi Ryokuchi Flea Market

20th–22nd @ Maishima Marche

【Total Race Information】

*The figures and information in this material are based on the GVB press release.

Koko Road Race 2026 Total Result: Approx. 1,600

Category Break down*

Half	Ekiden	Kids
660	578	359

Market Share Break down*

Guam	Korea	Japan	America	Other
39.36%	22.32%	20.08%	12.72%	5.52%



【Runner from Japan Details】 As of April 9

TOTAL	Half	Ekiden	Kids (0.6k)	Kids (1.6k)	Kids (3.3k)
267	180	69	9	4	5

KOKO ROAD RACE 2026

【Celebrities & Influencers】

In addition to the official ambassador, we invited running influencers, defending champions, Olympic gold medalists, and university Ekiden teams to enhance both the event's visibility and competitive level.

【Pre-Event Promotion】

We expanded awareness through multiple channels, including articles on RUNNET, flyer distribution at TIPNESS gyms, radio tie-up segments, and social media posts by influencers.

【On-site Promotion】

We hosted a meet-and-greet event with the ambassador and influencers, providing added value beyond the race itself and increasing participant engagement.

【Post-Event Promotion】

We continued promoting the event through media coverage and YouTube content, while also creating assets for future marketing use.



KOKO ROAD RACE 2026

GVB × Ko'ko' Road Race × FM Osaka Aka-maru

March Impact Summary

Objective

- Drive April 2026 race participation and accelerate last-minute Guam bookings from Kansai.

March Activation

- 2 dedicated FM Osaka segments
- Guest runners + real participant stories
- Race-linked travel package push
- Final booking momentum campaign before race month

Strategic Impact

- Turned race excitement into immediate booking demand, strengthening Guam's spring travel conversion in Kansai.



KOKO ROAD RACE 2026 - WINNERS

Half Marathon

Overall 1st Place Winners (Male & Female) from the Osaka Full Relay Marathon Mr. Hiroki Nakajima and Mrs. Tomomi Nakajima with their son Aoi Nakajima



Ekiden Relay

Top 3 Finishers represented by university Ekiden teams (organized by HIS)

1st Place: Rissho University

2nd Place: Osaka University of Economics

3rd Place: Setsunan University



Special Thanks to Consul General of Japan, Mr. Susumu Ueda, for his invaluable support, including participation in the ceremony, contribution to the water station, and involvement in the Ekiden Relay.

Korean Airlines Guam Promotion



Promoting travel from regional cities in Japan to Guam via Incheon BY KE

GVB Japan, in collaboration with Korean Air's Japan branch, launched a promotional campaign in April to encourage travel from regional cities in Japan to Guam via Incheon.

This initiative aims to address seat shortages at existing airports and stimulate demand for travel to Guam from regional cities. The promotion will run online through AirTrip, a major Japanese OTA, until June.

<https://www.skygate.co.jp/campaign/ke/gum2603/>

大韓航空で行く、グアム



GROUP SUPPORT PROGRAM



- Over the past month, we have received 11 new applications, and the total number of participants has increased by more than 500.
- We have also received a few inquiries from groups who, due to the conflict in the Middle East, have had to change their travel plans and are considering Guam as a destination.

Subject	as of 12 Mar. 2026	as of 10 APR. 2026	Increased
Total number of groups applying (cumulative)	83	94	11
Total number of groups cancelling (cumulative)	1	1	0
Total Number of Pax (cumulative)	4220	4731	511
Total subsidy amount	\$74,417	\$85,714	\$11,297
Cost per Person	\$17.63	\$18.12	\$0.48

EDUCATIONAL TRAVEL SUPPORT PROGRAM



Over the past month, we have received eight new applications, and the number of students has increased by more than 100.

The number of school field trips taking place during Japan's summer vacation is on the rise.

Subject: Educational Support	as of 12 MAR. 2026	as of 10 APR. 2026	Increased
Total number of groups applying (cumulative)	32	40	8
Total number of groups cancelling (cumulative)	0	0	0
Total Number of Pax (cumulative)	1653	1759	106
Total subsidy amount	\$53,013	\$53,013	\$0
Cost per person	\$32.07	\$30.14	(\$1.93)



NEW BUSINESS

Fuel Surcharge COUNTER MEASURE



Key Message

Encourage bookings and ticket issuance before the fuel surcharge increase in May

Content Overview

Two TikTok videos were developed to:

- Highlight Guam's attractions and travel appeal
- Drive traffic to Travelko for booking consideration
- Reinforce the urgency to book before the fuel surcharge increase

TV TOKYO DOC DRAMA SEASON 2



Travel Demand Engine

“The Reason I’m With You ” Season 2 of the fully Guam-doc drama

Section	Details
Production Timeline	Shooting: Apr 26 – Jun 25
Content Rollout	Episode 0: Jun / Main Series: Oct / Spin-off: TVer, U-NEXT, Prime
Viewing → Booking	Launch the Guam Pilgrimage Map featuring iconic beaches, sunset dining, wedding venues, and emotional scenic spots to convert story engagement into bookable travel experiences
Strategic Value	A long-tail tourism asset, not just PR — designed to drive continuous visitation
Next Action	Official launch of the Guam Pilgrimage Project

BRAND CAMPAIGN – TAXI ADS IN TOKYO



Taxi Advertising Campaign Performance

(GROWTH Network – Tokyo 23 Wards)

- Campaign Period: April 13 – April 26 (2 weeks)
- Total Video Plays: 2.4 million views
- Coverage: Taxi digital signage across Tokyo's 23 wards
- Estimated Monthly Network Reach: ~10–12 million viewers
- Average Passenger Viewing Time: 15–20 minutes per ride
- Implication:
 - High-frequency exposure to urban business and high-income audiences during extended ride times, generating strong brand visibility in Tokyo's core market.





- Execute a “Go Go Birthday” campaign across 100 locations of Go Go Curry, a nationwide Japanese curry chain, with a campaign on X (Twitter), to drive GMIF awareness.
- Fans following GVB × Go Go Curry enter to win 5 Guam trips (10 pax).
- The strong “Go Go” synergy unlocks new audiences beyond GVB’s reach and converts loyal Go Go Curry fans into incremental Guam bookings.



- Japan’s leading dried noodle food festival, Chef Casey will showcase Guam-inspired sweets to promote GMIF and Guam’s food appeal. The event attracts high foot traffic, strong SNS buzz, and food media attention, making it an ideal platform to convert food discovery into Guam travel interest.
- Strategic Value
- Turn food festival buzz into GMIF awareness and Guam travel demand.

- CALL TO ORDER
- REPORT OF MANAGEMENT
- JAPAN MARKET REPORT
- OLD BUSINESS
- NEW BUSINESS
- ANNOUNCEMENTS
 - JMC April Meeting – April Report Only
 - JMC May Meeting – May 19, 2026 at GVB Main

SI YU'OS MA'ÅSE'

